

**CITY OF LODI  
INFORMAL INFORMATIONAL MEETING  
"SHIRTSLEEVE" SESSION  
CARNEGIE FORUM, 305 WEST PINE STREET  
TUESDAY, JANUARY 21, 2003**

An Informal Informational Meeting ("Shirtsleeve" Session) of the Lodi City Council was held Tuesday, January 21, 2003, commencing at 7:50 a.m.

**A. ROLL CALL**

Present: Council Members – Beckman, Hansen, Howard, Land, and Mayor Hitchcock

Absent: Council Members – None

Also Present: City Manager Flynn, City Attorney Hays, and City Clerk Blackston

**B. CITY COUNCIL CALENDAR UPDATE**

City Clerk Blackston reviewed the weekly calendar (filed).

**C. TOPIC(S)**

C-1 "Discussion regarding City Council goals and objectives"

Deputy City Manager Keeter stated that she would be reviewing the goals and objectives that are in the current budget document and noted that "blue sheets" were distributed to Council listing objectives 5 through 16 (filed). Council is asked to voice opinions on whether additions, deletions, or amendments are desired. Ms. Keeter explained that goals are intended to establish the long-term vision for the City. They represent the desired accomplishments of the City organization. Council had previously adopted five goals, which were then used to prioritize projects. Ms. Keeter provided the following information on the current goals:

1. Improve Customer Service – All employees attended a customer service training class two years ago. As new employees are hired it is expected that customer service discussions will take place with their supervisor as part of the orientation process.

2. Enhance Access to Information – Staff interprets this to mean staying current with technology.

3. Ensure an Efficient and Productive City Organization – This is accomplished through the use of technology and meetings between the City Manager and Department Heads to review projects and the status of the departments.

4. Enhance Quality of Life and Provide a Safe Environment for Citizens – This is done through public safety, as well as recreational and cultural arts opportunities.

5. Develop the Lodi Economy – This is accomplished through economic development efforts; supporting the Downtown Lodi Business Partnership (DLBP), Chamber of Commerce, and Lodi Conference and Visitors Bureau (LCVB); and participating as a member of the San Joaquin Partnership.

Ms. Keeter explained that objectives are intended to support the goals and convert the Council policies into specific projects. The Council, City Manager, and staff previously identified the following objectives:

1. Develop Short and Long Range Operational Plans – Due to changing technology and regulations, staff is continuously evaluating how it does business and considers fiscal uncertainties when planning.

2. Promote Public Relations and Marketing Efforts – The City supports the DLBP, LCVB, and the Chamber of Commerce. These organizations partner with the City in promoting the community. The City also has a Community Promotions Coordinator who assists with events and marketing.
3. Implement Information Systems Strategic Plan – The Information Systems Division constantly changes, plans, and reacts to the needs of internal and external customers.
4. Pursue Efforts to be Entrepreneurial – The City is a service organization and staff serves the community in a businesslike manner.
5. Maintain City's Sense of Community – Lodi prides itself in providing programs and services found in larger cities; however, it continues to promote a small-town atmosphere. The City provides exemplary public safety, library services, and parks and recreation programs and activities.
6. Promote Commercial/Industrial Base – This is done primarily through Economic Development in conjunction with Community Development and Electric Utility. Commercial, industrial, and retail opportunities are offered for retention purposes and for businesses wanting to locate to Lodi.
7. Provide Resources to Maintain City's Infrastructure – Water, sewer, and electrical lines are maintained and Public Works has begun the water line replacement project on the east side.
8. Continue to Use Partnerships and Alliances to Advance City's Objectives – Regional and statewide issues are of concern to the City. Staff works with the League of California Cities, the San Joaquin Council of Governments, and other associations to advocate for the City.
9. Promote Urban Forestry – Staff is currently reviewing the street tree management and inventory report prepared by consultants.
10. Provide for a Balanced Community – This includes providing citizens and businesses with services and infrastructure that meets their diverse needs including housing, jobs, and the ability to play and enjoy family in the community.
11. Encourage Public Art, Cultural, and Recreational Opportunities – The master plan for Art in Public Places is currently in its first draft and will be brought before Council in the near future for review and approval.
12. Provide Appropriate and Sufficient City Facilities – Council made many recent decisions regarding space and facility needs for City employees as well as the general public, e.g., the public safety building, relocating the Finance Department to the parking structure, the aquatics facility, indoor sports center, DeBenedetti Park, utilization of the donated soccer field equipment, Fire Station #4, and the remodel of Fire Station #2.
13. Develop Effective Records Management Program – A records management program has been implemented in the City Clerk's Office, Police Department, and Fire Department. The Fire Department is now migrating to a client service. Suggestions have been made that the City consider a citywide records management program.
14. Evaluate Telecommunications Opportunities – Electric Utility puts in conduit for fiber optic whenever similar work is being done. The Utility will be coming to Council during the upcoming budget cycle with a capital project request to further pursue fiber optics.
15. Develop and Review Policies Relating to Providing Timely and Competent Customer Service – All City employees underwent training in customer service and it is expected that supervisors relay the information to new employees.

*Continued January 21, 2003*

16. Provide Employee Training and Education – Due to fiscal uncertainties the City Manager is reviewing all travel requests and has encouraged departments to have only one employee attend a specific training session and share the information with other employees. Certifications and necessary licensing will not be effected.

Ms. Keeter reported that the status of the City's highest priority projects will be reviewed at the regular Council meeting of February 5, and the review of revenue assumptions has been scheduled for February 19.

Mayor Hitchcock distributed information related to goals and objectives, which included a goal addition of "public trust" (filed).

Mayor Pro Tempore Howard recommended that objective 7 be amended as follows: "This objective includes providing adequate staff and funding for maintaining and replacing all forms of City infrastructure *including but not limited to*: water, sewer, electric, buildings, HVAC, equipment, and vehicles."

**D. COMMENTS BY THE PUBLIC ON NON-AGENDA ITEMS**

None.

**E. ADJOURNMENT**

No action was taken by the City Council. The meeting was adjourned at 8:04 a.m.

ATTEST:

Susan J. Blackston  
City Clerk



# CITY OF LODI

## COUNCIL COMMUNICATION

**AGENDA TITLE:** Discussion Regarding City Council Goals and Objectives

**MEETING DATE:** January 21, 2003

**SUBMITTED BY:** Deputy City Manager and Finance Director

**RECOMMENDATION:** That Council review the Goals and Objectives, as currently established and discuss any changes for inclusion in the proposed Fiscal Year 2003-05 Financial Plan and Budget.

**BACKGROUND INFORMATION:** The City currently has five "Major City Goals" as included in previous budgets. They consist of the following:

1. Improve Customer Service
2. Enhance Access to Information
3. Ensure an Efficient and Productive City Organization
4. Enhance Quality of Life and Provide a Safe Environment for Citizens
5. Develop the Lodi Economy

In addition, the budget document includes a list of 16 "Major City Objectives" (Attached) which support one or more of the "Major City Goals." The Objectives further describe the desired end result of various City programs.

**Funding:** Not applicable.

Respectfully submitted,

A handwritten signature in black ink, appearing to read "Janet S. Keeter".

Janet S. Keeter  
Deputy City Manager

Vicky McAthie  
Finance Director

Attachment

JSK/sl

**APPROVED:** \_\_\_\_\_  
H. Dixon Flynn -- City Manager

2003-05  
FINANCIAL PLAN AND BUDGET

Major City Goals  
And  
Objectives

1/21/03

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Major City Goals (5)



- Improve Customer Service
- Enhance Access to Information
- Ensure an Efficient and Productive City Organization
- Enhance Quality of Life and Provide a Safe Environment for Citizens
- Develop the Local Economy

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Major City Objectives (16)

- Develop Short and Long Range Operational Plans
- Promote Public Relations and Marketing Efforts
- Implement Information Systems Strategic Plan
- Pursue Efforts to Be Entrepreneurial

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### Major City Objectives (continued)

- o Maintain City's Sense of Community
- o Promote Commercial/Industrial Base
- o Provide Resources to Maintain City's Infrastructure
- o Continue to Use Partnerships & Alliances to Advance City's Objectives
- o Promote Urban Forestry
- o Provide for a Balanced Community

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### Major City Objectives (continued)

- o Encourage Public Art, Cultural & Recreational Opportunities
- o Provide Appropriate & Sufficient City Facilities
- o Develop Effective Records Management Program
- o Evaluate Telecommunications Opportunities

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### Major City Objectives (continued)

- o Develop & Review Policies Relating to Providing Timely & Competent Customer Service
- o Provide Employee Training & Education

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## Next Public Meeting

- February 5**
  - Status of Highest Priority Projects
- February 19**
  - Review of Revenue Assumptions

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## Budget Calendar

Discussion on Status of Highest Priority Projects	2/05/03	2/05/03
City Manager Revenue Review	2/10/03	
Departments Submit Requests to Finance	2/17/03	
City Council Review of Revenue Assumptions		2/19/03
City Manager Review of Budget Requests	2/03/03	
City Council Review of Revenue Assumptions		3/05/03
Discuss Significant Expenditure and Staffing Requests		3/10/03
Discuss Significant Expenditure and Staffing Requests		4/02/03
Update on State Budget		4/10/03
Discuss Fund Balance and Release of Draft Budget Document		5/07/03
City Council Review of Financial Plan & Budget		6/04/03
City Council Review of Financial Plan and Budget - Special meeting		6/15/03
Adopt Financial Plan and Budget		6/18/03

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## **2003-05 FINANCIAL PLAN AND BUDGET**

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### **MAJOR CITY GOALS**

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#### **Background**

As shown in this budget document, goals represent the highest level of a hierarchy of planning statements for the City of Lodi. This hierarchy is comprised of:

- Major City Goals
- Major City Objectives
- Major City Projects

Through the process of identifying and incorporating major City goals, objectives and projects into the 2003-2005 Financial Plan and Budget, and by continuing this process in future documents, the citizens of Lodi will understand:

- 1) Where the City intends to concentrate expenditure of available resources
- 2) Anticipated outcomes and benefits of this investment of resources

Goals establish a long term vision for the City of Lodi. They are characterized by the following properties:

- Goals establish policy direction and focal points for the efforts of City staff.
- They represent the desired accomplishments of the City organization.
- Goals are not expressed in terms of work that must be performed - but in terms of the desired state or condition of the City after work has been performed.

Since goals represent a desirable state or condition, they are not prone to radical change after the completion of a two year cycle, any more than the fundamental aspirations of the City are likely to change over a very short time frame.

City Council, the City Manager and Department Heads have established five major City goals:

#### **1) Improve Customer Service**

The City of Lodi is in the business of serving its community. Lodi city government operates in a marketplace that competes for business, shoppers, visitors, residents and users of our services.

In order to succeed, we understand all employees must provide exemplary service for external and internal customers.

#### **2) Enhance Access to Information**

In the continuing world of technological change, the City of Lodi must be aware of the position we hold. Part of our mission is providing information to a variety of customers. Enhancing access to information provides for an acknowledgment of that service and an efficiency in the operation.



## **2003-05 FINANCIAL PLAN AND BUDGET**

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### **MAJOR CITY GOALS**

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#### **3) Ensure an Efficient and Productive City Organization**

In response to the competitive nature of running the City, it is incumbent upon every member of the organization to investigate and implement policies which increase our productivity.

The City will look to be entrepreneurial where sound policy dictates. The City will continue to use new technologies in a cost-effective manner.

#### **4) Enhance Quality of Life and Provide a Safe Environment for Citizens**

Lodi's small town atmosphere and sense of community are assets that make this a special place. Terms like "Quality of Life" are implemented here through recreational and cultural opportunities.

Further, public safety is a basic element of Lodi's quality of life. The City will continue to use education, prevention and enforcement to enhance our citizens' sense of safety.

#### **5) Develop the Lodi Economy**

A successful community sustains itself by ensuring a balance in physical, economic and human development. Developing the Lodi economy recognizes there are many players responsible for making the community a success.

The City is committed to providing existing business with a beneficial atmosphere in which to operate. The City believes the same environment will attract new business. It is understood providing high-quality programs and service is based on the need for a strong economic base.

## **2003-05 FINANCIAL PLAN AND BUDGET**

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### **MAJOR CITY OBJECTIVES**

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#### **Background**

Objectives represent the next level of the hierarchy of planning statements for the City of Lodi. They are characterized by the following properties:

- \* Objectives support one or more major City goals and begin to convert Council policy as expressed through goals into specific project activities.
- \* Objectives more specifically describe the desired end result of various City programs.

City Council, the City Manager and Department Heads have established sixteen major City objectives:

#### **1) Develop Short and Long Range Operational Plans**

The City operates in an environment of constantly changing regulations and technology. This environment compels us to transform our operations in order to remain competitive.

Departments must develop plans appropriate for the changing circumstances in their industry. These plans will place the City in a position to provide the services citizens desire at prices they are willing to pay.

#### **2) Promote Public Relations and Marketing Efforts**

All existing assets, as well as new forms of service delivery and other planned features for the City, will not enhance our quality of life if the public is not educated. People must understand what the City has to offer if they are to recognize its value.

The City must convey sound information regarding its services to the public. We must promote a positive image to citizens, as well as visitors and business owners outside Lodi, in order to attract them to our community.

#### **3) Implement Information Systems Strategic Plan**

Computer based information technology is a fundamental part of the City's administrative infrastructure. It must be planned and managed with the same care and attention as roads, buildings or staff.

Implementation of the Information Systems Strategic Plan will provide resources needed for progress on many City objectives.

#### **4) Pursue Efforts to be Entrepreneurial**

This objective addresses providing needed services in a business-like fashion. As the face of local government continues to change, the City should think of itself as a service organization first and a government second. The role of competition and choice of service should be considered whenever City programs are reviewed.

## **2003-05 FINANCIAL PLAN AND BUDGET**

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### **MAJOR CITY OBJECTIVES**

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#### **5) Maintain City's Sense of Community**

Lodi's small town atmosphere and sense of community are assets. This perception is transmitted through our community's commitment to families. Programs and services, combined with special "family oriented" events, make Lodi a chosen place to live and work.

Constant attention is necessary in order to support this positive community attribute.

#### **6) Promote Commercial/Industrial Base**

Lodi has taken a proactive approach to business retention and attraction. We are committed to providing existing businesses with a healthy atmosphere in which to operate. This attitude will assist us in attracting new business.

City policies and programs should continue to act as catalysts to achieve this objective.

#### **7) Provide Resources to Maintain City's Infrastructure**

All residents of Lodi, existing and future, require a reliable service delivery network to maintain our quality of life.

This objective includes providing adequate staff, and funding for maintaining and replacing all forms of City infrastructure - water, sewer, electric, buildings, HVAC, equipment, and vehicles.

#### **8) Continue to Use Partnerships and Alliances to Advance City's Objectives**

While local control is important to the City, particularly in the area of land use, we recognize we are part of a larger region. Many issues are truly regional (e.g., annexation policy, habitat preservation, air quality).

The City must work with other agencies, both public and private, to develop strategies to address regional issues.

#### **9) Promote Urban Forestry**

Trees add considerably to the aesthetics of our community. They promote a good community environment, contribute to clean air, provide cooling shade and support wildlife.

Policies that continue the "greening" of the City enhance our quality of life.

#### **10) Provide for a Balanced Community**

A balanced community understands the dynamics between the physical, economic and human segments in Lodi.

A balanced community will provide residents and business with infrastructure and services needed to fulfill the community's diverse expectations.

## **2003-05 FINANCIAL PLAN AND BUDGET**

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### **MAJOR CITY OBJECTIVES**

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#### **11) Encourage Public Art, Cultural and Recreational Opportunities**

An Art in Public Places program, as well as abundant cultural and recreational opportunities, enhances Lodi's quality of life and strengthens our appeal as a destination.

City staff must continue to pursue development of high quality programs at facilities which encourage expression of the human spirit. These facilities include a well maintained parks and natural areas infrastructure.

#### **12) Provide Appropriate and Sufficient City Facilities**

Based on community growth and needs, this objective requires providing adequate facilities and equipment to City employees. This will enable us to properly perform our jobs and serve the public.

This objective includes providing sufficient City parks, community center improvements, public art, libraries, etc.

#### **13) Develop Effective Records Management Program**

A central mission of the City is focused on information delivery. A basic need is to create a systematic program for acquisition, processing, use, protection, storage and retrieval of all recorded information.

The City is committed to providing the public, our customers, with records required to conduct business. The City should take advantage of available technology to implement this program.

#### **14) Evaluate Telecommunications Opportunities**

All businesses, including the City, will require an advanced telecommunications and information sharing infrastructure to operate effectively in the 21st century.

The City must formulate programs for providing a modern telecommunications infrastructure. This should include features such as transmission towers, underground fiber optics conduit and emergency communications technology.

#### **15) Develop and Review Policies Relating to Providing Timely and Competent Customer Service**

Consistent policies which apply across all departments must be developed to provide customers with a uniform and professional approach when interacting with the City. Policies should address telephone manners, handling difficult situations, and dealing with potential and actual vendors and consultants.

#### **16) Provide Employee Training and Education**

In order to provide the best possible services for our community, it is imperative we have the best educated and trained employees possible. The City's investment in itself pays dividends by creating an efficient and productive organization.

## **The Difference between goals and objectives**

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Goals are broad; objectives are narrow.  
Goals are general intentions; objectives are precise.  
Goals are intangible; objectives are tangible.  
Goals are abstract; objectives are concrete.  
Goals can't be validated as is; objectives can be validated.

## **What are Objectives and Goals?**

Objectives and goals provide you with a focus. These are determined largely by your values.

In short, objectives are short-term goals. They are stepping stones on the way to meeting long term goals. Each of these contributes directly to the long-term goals you have set.

## **Setting Goals and Objectives**

*The difference between where we are (current status) and where we want to be (vision and goals) is what we do (target objectives and action plans).*

Setting goals and objectives builds on visioning. Goals are simply a clearer statement of the visions, specifying the accomplishments to be achieved if the vision is to become real. The target objectives are clearer statements of the specific activities required to achieve the goals, starting from the current status.

## **SETTING GOALS FOR YOUR ORGANIZATION**

There are three levels of defining your organization's priorities:

1. Purpose or Mission is a broad, general statement that tells why your organization exists: usually doesn't change from year to year and is often the first statement in your constitution.
2. Goals are statements describing what your organization wishes to accomplish, stemming from your purpose or mission. Goals are the ends toward which your efforts will be directed and often change from term to term or year to year, depending on the nature of the group.
3. Objectives are descriptions of exactly what is to be done, derived from the goals; clear specific statements of measurable tasks that will be accomplished as steps toward reaching your goals.

## **City of Lodi Goals & Objectives**

**The major goals of the City of Lodi are to ensure:**

- **A high quality of life & safe environment**

- Maintain City's sense of community
- Provide for a balanced community
- Provide resources to maintain City's infrastructure
- Promote urban forestry
- Encourage public art, cultural & recreational opportunities
- Provide appropriate & sufficient City facilities
- Pursue efforts to be entrepreneurial
- Continue to use partnerships and alliances to advance City's objectives
- Promote commercial & industrial economic base
- Evaluate telecommunications opportunities
- Provide paramedic services

- **An efficient, productive & fiscally sound City organization**

- Develop short and long range operational plans
- Develop effective records management program
- Develop policies which provide timely & competent customer service
- Implement information systems strategic plan
- Provide employee training & education
- Evaluate telecommunications Opportunities
- Provide a balanced budget & adhere to adopted budget policies

- **Public trust**

- Promote public relations and marketing efforts
- Ensure open, easily accessible, public meetings
- Enhance access to information
- Improve customer service

***California in the New Millennium***  
***The Changing Social and Political Landscape***

By Mark Baldassare & copublished with the Public Policy Institute of California, 2000

**A CLIMATE OF POLITICAL DISTRUST**

California is at a critical juncture. The problems it faces require not only building consensus about how to respond, but also empowering the state's political institutions and government representatives to carry the ball. Yet Californians are so politically disengaged and profoundly distrustful of those very institutions and representatives that government may be hamstrung in its efforts to respond. The more significant the problem, the more public trust is required for government to act effectively. With anything short of a miracle, that trust is unlikely to be forthcoming.

From the focus groups and survey responses, it is clear that Californians don't care much and are cynical about politics. They are not keen on voting. They see their governments as bloated bureaucracies and believe that their elected officials are in the pockets of special interest groups. They think what they read in the newspapers about politics and government is probably slanted or biased. A resident of the state capital, Sacramento, summed up many people's feeling by saying, "The name 'politician' is synonymous with 'crook'".

There are major differences among the regions in perceptions and evaluations of the state's economy and local community conditions. Across regions, residents differ even in their ratings of local public services and satisfaction with the quality of their lives. These differences are a result of the varying economic, growth, racial and ethnic, and community conditions in the regions.

There are also significant differences in political attitudes. Central Valley residents are less trusting of government than others.

**POLICY RECOMMENDATIONS FOR THE FUTURE CALIFORNIA**

1. State and local government reforms should be implemented with the goal of increasing government efficiency, responsiveness, and accountability.

A "C-" grade for state government just will not do for a California that is confronted with so many social challenges and economic opportunities. The residents of the state are deeply distrustful of government and politicians. Few expect their governments to do what is right. Many fret that the people they have elected to office are wasting their tax money. Californians do not believe that their government represents average people like themselves, and they see their politicians as more inclined to bend to the wishes of special interests. Some of these sentiments are drawn from negative reports in the media, but many times these perceptions are based on real experiences. Some even say that the system of state and local government today is dysfunctional.